

# **A Profile of the Foreign Visitor to Gozo**

**Leslie Vella**

*Research and Planning Manager, NTOM*

The island of Gozo is a special component of the tourism product of the Maltese islands, in that it presents a unique and unspoilt product, which is sufficiently different from what countries neighbouring Malta can offer. Due to the constraints posed by isolation and small size, Gozo has managed to retain a lot of what Malta has lost to touristic, industrial and domestic housing development.

Because of its appeal and its proximity to Malta, which attracts in excess of one million tourists per annum, Gozo attracts a substantial volume of visitors and tourists, both Maltese and foreign throughout the year.

Foreigners constitute a sizeable share of traveller inflow to Gozo and travel to the island either as tourists on a Gozo only holiday or as part of a two centre holiday with Malta, or as day trippers on organised tours from Malta.

## **STATISTICS**

Unfortunately, most tourism statistics for the Maltese islands only provide data on a national basis, with the result that regional data is almost non-existent at an official level. This makes it very difficult when it comes to quantifying the importance of tourism within a specific area such as Gozo.

Nevertheless, a destination like Gozo needs to be in possession of a variety of data to enable serious planning to take place. It is very difficult to attempt planning for the future when the present frame-

work is very fragmented and almost non-existent.

Notwithstanding these problems, some information is available, particularly as a result of on going and other ad hoc research carried out by the National Tourism Organisation and the Department of Tourism.

### **FOCUS**

This paper will focus specifically on the international traveller to Gozo placing a special emphasis on the international tourist - that is, the foreign traveller who spends at least one overnight stay on the island.

At this point, however, it is important to depart from the premise that the data which will be presented is merely indicative, particularly that data concerning volumes. It is meant to present a broad framework rather than facts which are to be taken verbatim.

What is the source of the data? During 1993, the National Tourism Organisation carried out seven sample surveys of foreign travellers to Malta. These surveys were targeted at the major nationality groups. Two waves of respondents were sampled during off-peak months and summer months in order to account for seasonal variations.

Using the data generated from these surveys as a base, this paper will attempt to create a profile of the foreign tourist to Gozo.

### **THE SUPPLY SIDE**

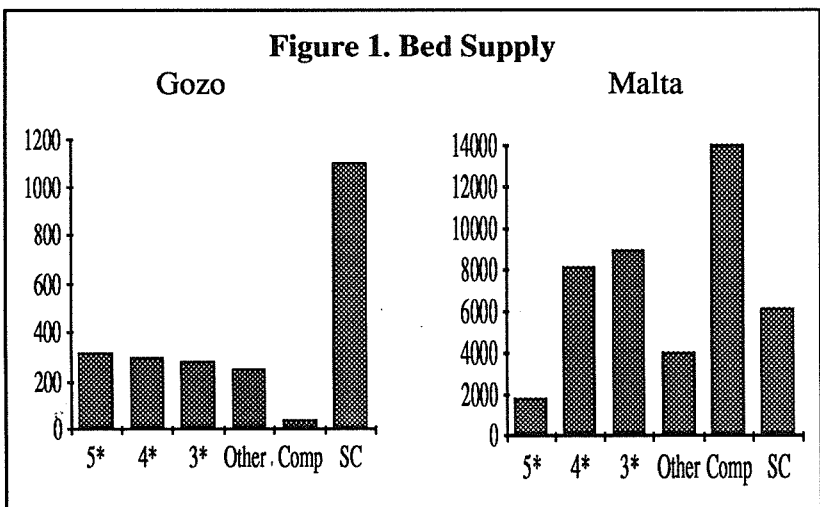
Prior to this, however, it would be appropriate to discuss the nature of present day tourism supply and demand on the island. On the supply side, data supplied by the Hotels and Catering Establishments Board (Figure 1) indicates that there are 2,250 licensed beds on Gozo. One half of these beds are in hotel-type accommodation and one half are in self-catering accommodation. This is however, only the tip of the iceberg.

It is a well known fact that there is a much bigger amount of plant in the form of unlicensed apartments which is used for tourism purposes: be it international or domestic tourism. Most unlicensed accommodation is presumably utilised by domestic tourism originating from Malta; however there definitely remains a sizeable quantity of beds which are utilised by foreign tourists and which are unlicensed.

Given this scenario, the accommodation sector in Gozo is distinctly different from that for the whole of Malta. It is evident that self-catering accommodation plays a very important role, and accounts for at least 50% and probably even up to 80% of the total bedstock accessible to foreign tourists. In the case of Malta, self-catering, although traditionally a very important component of the accommodation sector, has now declined in importance, and hosts less than 40% of nights stayed.

On the hotel front there is also a substantial variation from the Malta product. Almost three out of every ten hotel beds on Gozo are in 5 star hotels while another one in four beds are in 4 star hotels. This means that half the hotel bedstock in Gozo is in quality accommodation.

3 star hotels, which form a substantial component of the Maltese



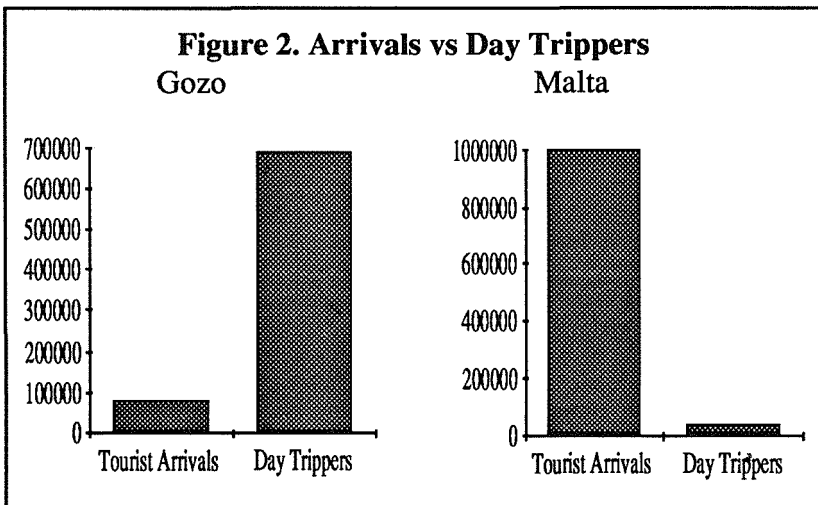
accommodation sector, account for 24% of Gozitan hotel bedstock. On the other hand, tourist complexes are almost non-existent on Gozo, whereas on Malta they supply 14,000 beds or 38% of hotel bedstock.

### THE DEMAND SIDE

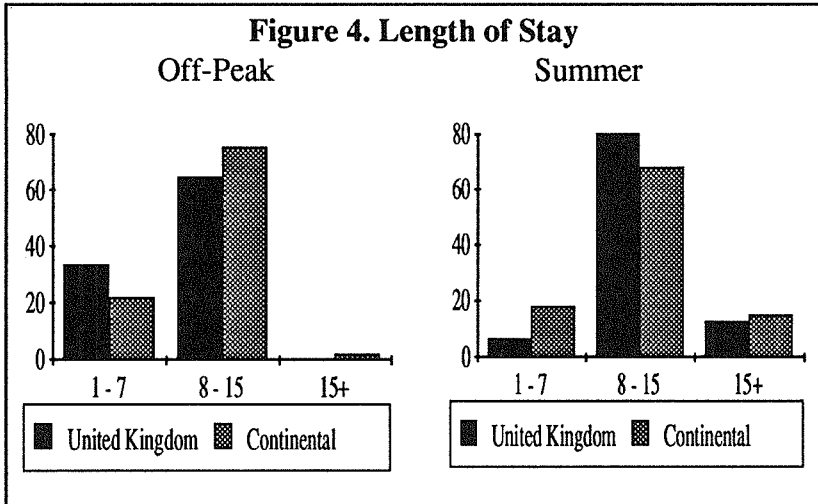
After this brief glance at the supply side a few estimates of foreign traveller demand will follow. On the basis of the research it emerges that up to 690,000 of the one million tourists who stay in Malta go for an excursion to Gozo in the form of a day trip (Figure 2).

This makes Gozo a much bigger excursionist destination than Malta. The vast majority of excursionists in Malta which number around 50,000 annually are cruise passengers who undertake a sightseeing tour of the island. In the case of Gozo, however, the large base of tourists already holidaying in Malta is instrumental in leading to such a high number of excursionists. Gozo has a very efficient system which is aimed at catering for day trippers although the island does tend to become overcrowded at peak times particularly when a large number of Maltese also make a crossing to the island.

Beside these day trippers, Gozo also attracts bona fide tourists who spend at least one overnight stay on the island. An accurate esti-







catering accommodation including complexes, is more popular during the summer than during off-peak months for both British and Continental tourists to Gozo. The share of medium quality hotel accommodation hovers between 20% and 30% in all cases.

*Length of Stay.* Figure 4 supplies some indications about the length of stay characteristics of tourists holidaying in Gozo. In the case of stays of up to seven days, off-peak tourists, both British and Continental, tend to have a higher tendency for this shorter holiday. There are suggestions however that fewer British summer tourists to Gozo opt for this sort of arrangement.

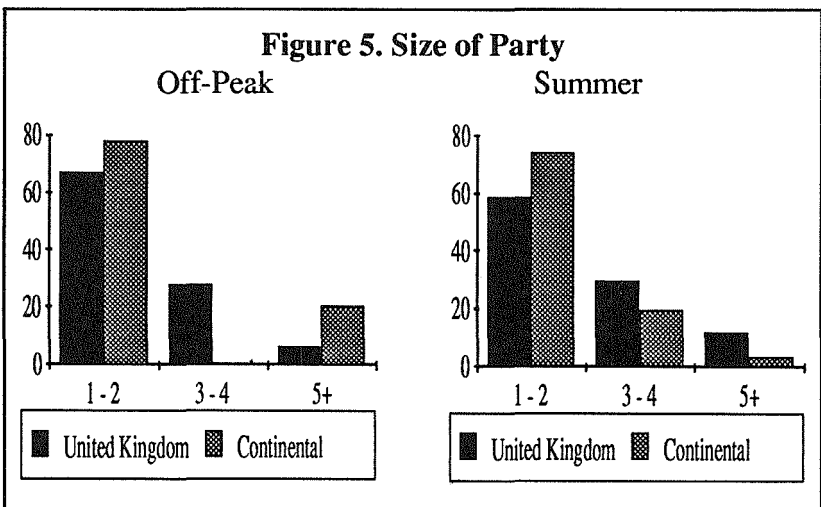
The bulk of Gozo's tourists opt for a holiday of between 8 and 15 days duration, as is evident for the British and Continental data for both time periods. Finally, whereas off-peak travellers of all nationalities do not tend to stay for more than 15 days, there is a substantial segment of summer travellers - around one in every six to be precise - that stay in excess of a fortnight.

*Size of Party.* Figure 5 gives information on the size of party characteristics of the Gozo tourist. Around one half of British off-peak and summer tourists holiday in Gozo as couples, while around seven out of ten continental off-peak and summer tourists to Gozo travel

as couples. Families composed of three to four persons account for 30% of British off-peak and summer tourists to Gozo. Around 20% of continental summer tourists belong to this grouping, while there is a negligible amount of continental off-peak family travel to the island. Groups of more than five people account for between 5% and 12% of British year-round and Continental summer Gozo tourists, but there is evidence to suggest a stronger share of continental off-peak group business that could be as high as 22% of continental traffic during this time of the year.

*Travel Arrangements.* The travel arrangements made by tourists travelling to a destination are a very good indication of the type of travellers that the destination attracts. Data relating to this area is presented in Figure 6. In the case of continental tourists there seems to be a ratio of one independent traveller for every three who organised their Gozo holiday through a travel agent. A similar ratio applies to the British summer tourist to Gozo. However, up to one half of British off-peak travellers to Gozo may be independent travellers making their own arrangements. This might be linked to repeat business by experienced tourists, an aspect which is examined in detail in Figure 7.

As in the case of Malta, continental off-peak tourists are mostly on their first visit to the destination. The continental summer visitor

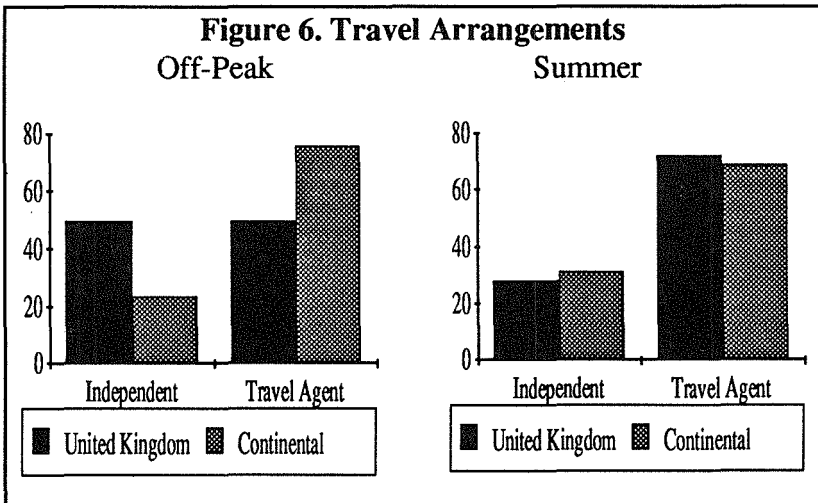


is still predominantly a first-time visitor to Gozo although almost one in four continental summer tourists claim to have been to the island on a previous occasion.

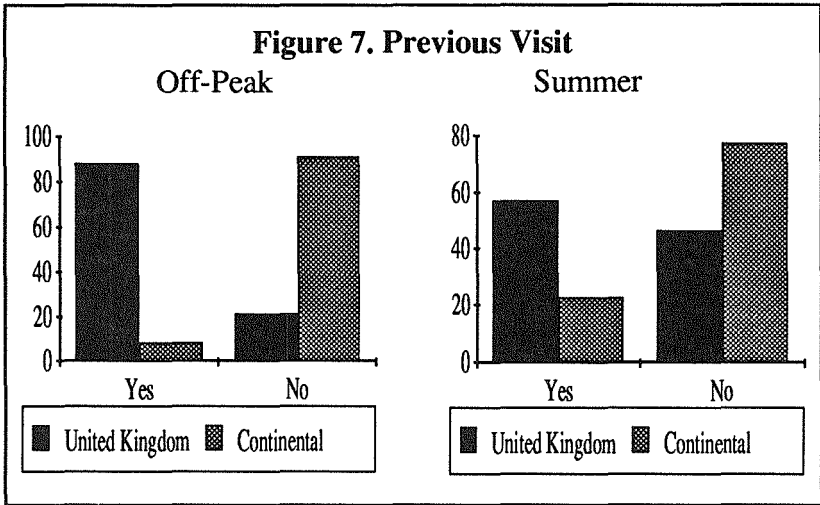
As is to be expected, there is a higher level of British repeat business with 80% of British off-peak visitors having already been to Gozo before:- 44% of them between twice and four times and a further 28% five times or more! Well over one half of British summer tourists to Gozo are repeat visitors but 44% are on their first holiday on the island.

*Main Annual Holiday.* Figure 8 gives information on whether the Gozo holiday was respondent's main annual holiday or a secondary holiday. In the case of both British and Continental visitors, the summer trip to Gozo was the main annual holiday for around 90% of travellers. In the off-peak period, however, a substantial 39% of continental tourists to Gozo and 33% of British tourists to Gozo were having a vacation which was not their main annual holiday. This is a very clear indication of the quality of tourist that the destination attracts because it is a very particular type of client who can afford to travel for a second or third time during the year.

*Purpose of Visit.* The purpose of the visit to Gozo is examined in the data presented in Figure 9. Most tourists go to Gozo for holiday



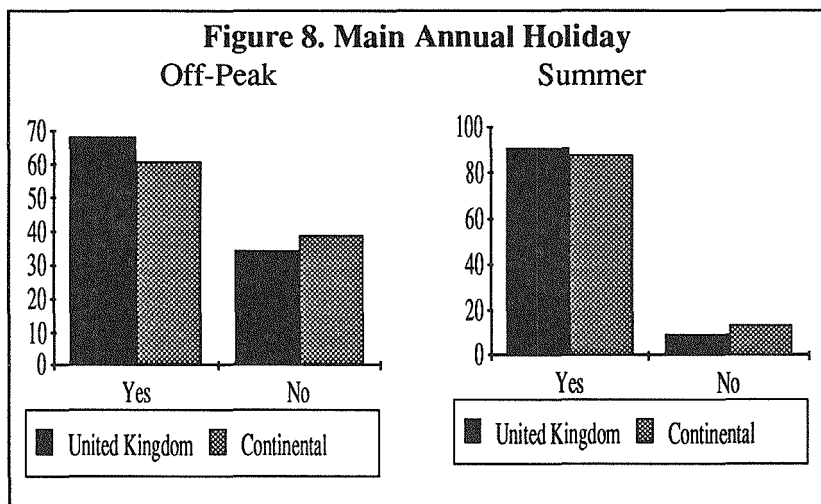




purposes, while very few go on business trips. There is a reasonable amount of British year round VFR traffic (visiting friends and relatives) which also exists to a certain extent with continental summer tourists. A few continental summer tourists claim that their Gozo holiday is for study purposes. In the case of continental off-peak travellers to the island, however, this segment may account for as much as 18% of total visitor inflow.

*Motivation and Influence.* The research also sought to obtain details on the motivational aspects of travellers to Gozo. Table 1 (see appendix) gives details on the reasons given by British and Continental summer visitors holidaying in Gozo. The agreeable climate emerges as the strongest reason together with the novelty of the destination. The effect of a previous visit is more strongly identified by British summer visitors than by continentals, but recommendation by friends and relatives is listed by the continentals but not the British summer tourists.

Table 2 (see appendix) supplies the same data for off-peak tourists to Gozo. Climate and novelty remain the main reasons for British off-peak visitors. The effect of a previous visit is also identified as an important reason by British off-peak travellers to Gozo, while the importance attached to the island's history and culture suggests a more discerning type of traveller. In the case of continental



off-peak travellers it is possibly surprising to note that the main reason for visiting Gozo is the fact that English is spoken – although one may link this with the high number of study related trips mentioned earlier. Recommendation by friends and relatives remains important with continental off-peak travellers as well as Gozo's history and culture which was not identified by continental summer travellers. The novelty of the destination and its agreeable climate, although listed, do not feature highly in continental off-peak Gozo travellers' list of reasons for opting to holiday on the island.

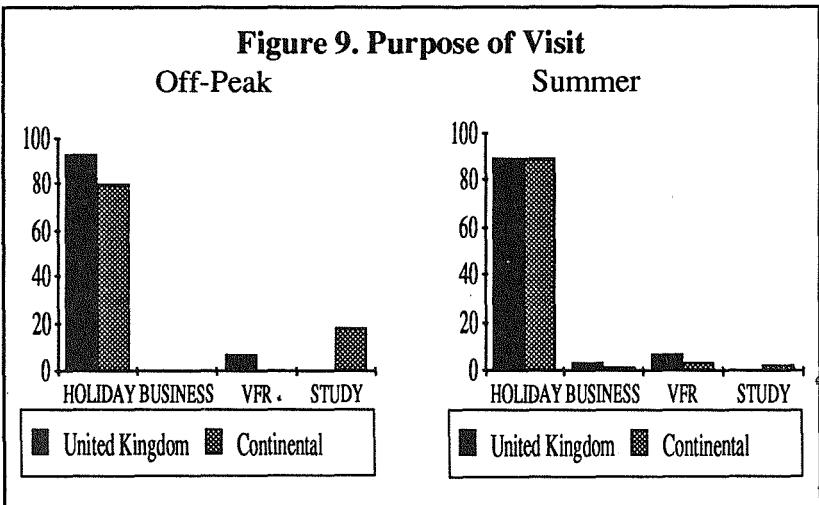
While these last two sets of data discussed the reasons given by survey respondents as to why they had selected Gozo as their holiday destination, a further question attempted to uncover the means which actually led them to think about Gozo as a destination worth visiting.

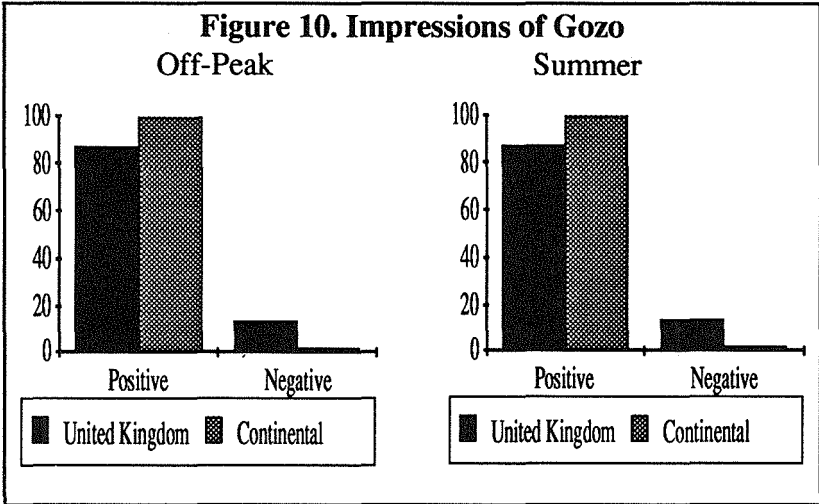
Table 3 (see appendix) supplies data about the means that influenced the choice of Gozo for British and Continental summer visitors. The most important media identified by the two distinct groups are recommendation by friends and relatives and tour operator brochures. Travel agent recommendation is also listed as having been instrumental in selecting Gozo. Travel guides are identified by both groups although much more strongly by the continentals, who also

give a vote of confidence to the tourist office literature on the island.

Table 4 (see appendix) supplies the same data for British and Continental off-peak travellers. In the case of the British, recommendation and tour-operator brochures are the main factors that influence the choice of Gozo. For the continental off-peak traveller recommendation by friends and relatives is a very important influencing factor but it is very interesting that tour guides influence one-fifth of continental off-peak tourists to the island: these are people who have decided to visit Gozo specifically on reading a travel guide. Tour-operator brochures, and to a lesser extent advertising, were also identified by continental off-peak tourists as being influential in their choice of Gozo.

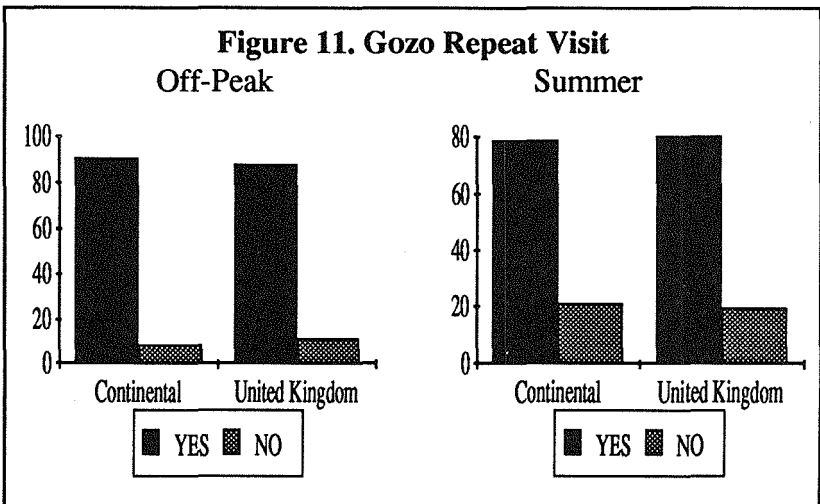
The information that has just been presented indicates very clearly one very important point: the power of recommendation. The research has shown very clearly that recommendation by friends and relatives was one of the main reasons that influenced the decision to holiday in Gozo. It therefore follows that Gozo needs to continuously keep generating satisfied travellers so that the destination will continue to benefit from such important word of mouth promotion. Indicators obtained from research are encouraging and sug-

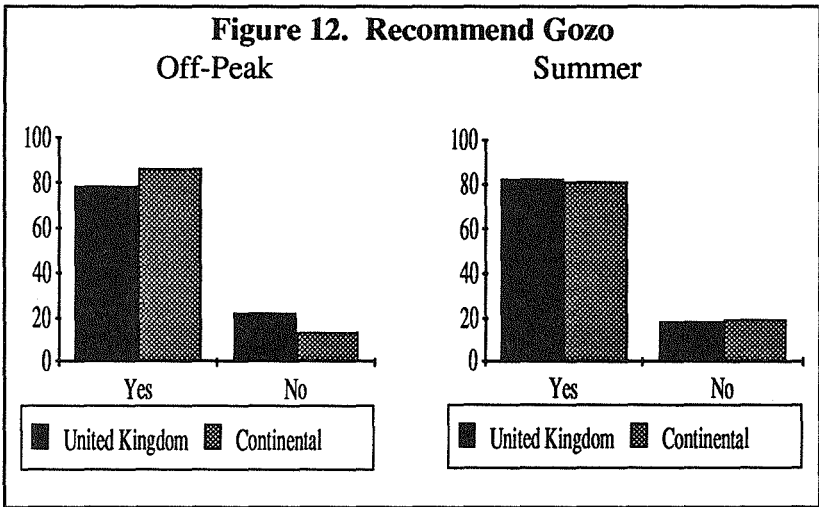




gest that the destination continues to live up to foreign visitors' expectations.

*Impressions of Gozo.* Figure 10 shows what survey respondents' general impression of Gozo was, and it is evident that the destination has a very positive image with well over 75% of those who visit it for holiday purposes. The level of satisfaction tends to be higher with summer visitors in relation to off-peak visitors.





*Repeat Business.* Figure 11 examines the potential of repeat business and once again one encounters a situation where the vast majority of foreigners on holiday in Gozo are willing to come back again – even the continentals who usually tend to want to visit new places rather than indulge in repeat business.

*Recommendation of Gozo.* With such satisfied customers it is natural to assume that current foreign visitors to Gozo would be willing to recommend the destination to their friends and relatives. As evident in Figure 12 well over 80% would be willing to undertake this sort of lip service on behalf of Gozo.

## CONCLUSION

This brings this presentation to an end. Once again it is worth remembering that this document proposes to create only a crude framework on the basis of which more detailed studies of the Gozitan tourist industry may eventually be carried out. The one fact that has definitely emerged is that Gozo does indeed have a thriving tourist industry that has the potential to continue generating additional revenue to the island's economy.

In spite of this optimism, however, some very serious consideration need to be given, prior to engaging in any form of future expansion-

ist development. The tourist who is fascinated by today's Gozo is the same tourist who was fascinated by Malta thirty years ago – a Malta which he perhaps spurns today due to excessive development and human activity.

Today's sophisticated international tourist has an almost infinite range of travel options available, and will quickly and undoubtedly abandon a destination that becomes spoilt for the sake of excessive tourism development. Gozo is a gem that should be preserved primarily for its inhabitants and also for the countless multitudes of future foreign travellers who will continue to be enchanted by its unique beauty which, as Edward Lear put it over a hundred years ago, is such that there are no words to describe it.

## APPENDIX

### Reasons for Choosing Gozo

Table 1

<i>United Kingdom - Summer</i>	
Agreeable climate	46%
A new place to go	41%
Previous visit	35%
Local hospitality	26%
English is spoken	22%
Value for money	17%

<i>Continental - Summer</i>	
Agreeable climate	42%
Something new	42%
Recommended by friends/relatives	23%
Value for money	22%
Previous visit	19%

Table 2

<i>United Kingdom - Off-peak</i>	
Agreeable climate	47%
A new place to go	35%
Previous visit	29%
History/culture	29%
English is spoken	24%
Recommended by friends/relatives	24%

<i>Continental - Off-peak</i>	
English is spoken	66%
Recommended by friends/relatives	56%
History/culture	50%
Something new	40%
Agreeable climate	32%
Value for money	21%

### Factors that Influence Choice of Gozo

Table 3

<i>United Kingdom - Off-peak</i>	
Recommended by friends/relatives	37.2%
Tour-operator brochure	32.6%
Recommended by travel agent	11.6%
TV programme	07.0%
Travel guide	07.0%

<i>Continental Summer visitor</i>	
Recommended by friends/relatives	52.8%
Tour-operator brochure	34.1%
Travel guide	30.8%
Recommended by travel agent	11.9%
Tourist office information	11.5%

Table 4

<i>United Kingdom - Off-peak</i>	
Recommended by friends/relatives	100.0%
Tour-operator brochure	45.5%

<i>Continental off-peak visitor</i>	
Recommended by friends/relative	59.6%
Tour guide	20.2%
Tour-operator brochure	18.8%
Advertising	13.8%